

# Case Selection and Case Intake

Maryland Employment Lawyers  
Association Conference  
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# Establish Your Goals

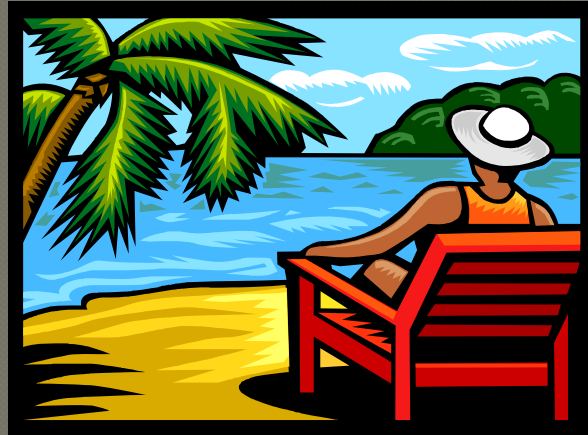
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- Goals are based upon the type of practice (Small firms vs. Large Firms)
- Goals are established by your needs
- Goals are established by prioritizing needs



# Case Goals

- Cash Flow without risk
- Quick cash with risk
- Those cases that establish your firm's trademark or theme
- Those cases on which you retire



# Types of Cases

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- ◉ Discrimination claims – disparate treatment
- ◉ Types: Age sex, race, etc.
- ◉ Sexual Harassment
- ◉ Severance Agreements
- ◉ Whistle Blower cases

# Types of cases

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- Mediation cases
- Alleged unlawful discharge for severance
- Wage related cases
- Claims with State law claims that are worth more than original claim

# What do you need to survive?

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- Small firms require constant cash flow



# What do you need to survive?

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- ◉ Medium size firms need cash flow
- ◉ Large firms need cash flow



# Cases that generate quick cash?

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- Consultations for case evaluation (Once)
- Severance Agreements

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- Non-Compete Evaluations

# Cases that generate quick cash?

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- Consultations for case evaluation (Once)
- Severance Agreements
- Non-Compete Evaluations
- Mediations or settlement discussions

# Cases with some cash flow but with larger rewards

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- ◉ Wage Payment Claims
- ◉ Other wage related claims such as FLSA
- ◉ Severance agreements requiring significant negotiation

# Large work but lots of money

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- Sexual Harassment Claims (also may fit into other categories depending upon parties and damages)
- Age Discrimination
- Other types of discrimination/disparate treatment cases that do not require experts or are readily provable

# Intakes and Intake Procedures

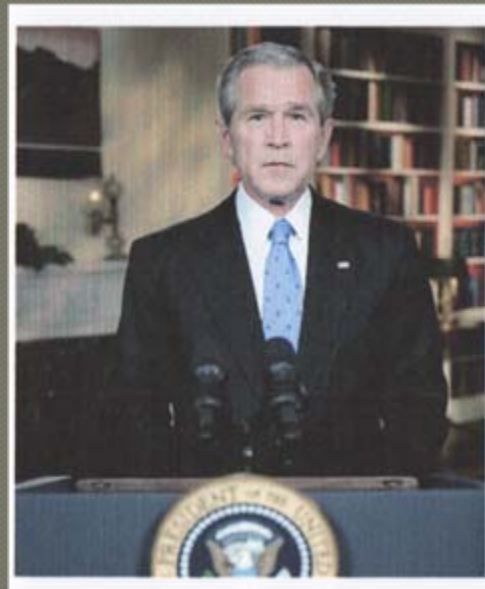
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- Time management in the process
- Standards for free consultations and fee consultations
- What information is needed in every case?

# John's Ten Rules for Case Selection

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1. Set priorities and goals for selection and do not deviate from them



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2. Charge Consultation Fees for face to face meetings (thinning the herd).
3. Get the right information.
4. Don't let the client dictate the analysis of the case or value of case.

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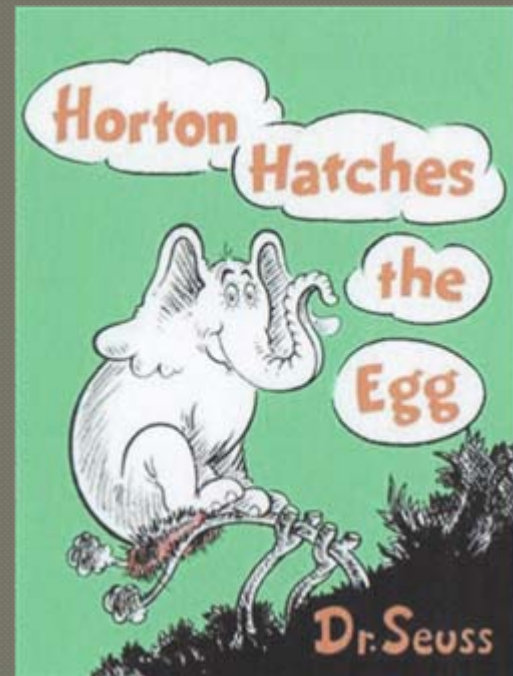
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5. Don't take a case you won't try.



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6. Don't be fooled by client's about facts particularly in large cases.
7. Don't ever take on big, fact dependent cases without thorough investigation
8. Know how to value your case.

# John's Ten Rules for Case Selection

9. Don't take on cases that you or the client do not have the money to try.



# John's Ten Rules for Case Selection

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9. Don't take on cases that you or the client do not have the money to try.
10. Don't let your heart determine case selection, **USE YOUR HEAD.**

